# Statement of Work
# Website User Needs Assessment and Responsive Design
# Project #13791

**ERS**

EMPLOYEES RETIREMENT
SYSTEM OF TEXAS

Benefits Communications Division
December 11, 2015

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## 1.0 Introduction/Background

The Employees Retirement System of Texas (ERS) is a constitutional trust fund established as mandated by Article XVI, Section 67, Texas Constitution, and further organized pursuant to Subtitle B, Title 8, Texas Government Code, as well as 34 Texas Administrative Code, Sections 61.1, et seq.  ERS administers a retirement and disability pension plan for state employees, law enforcement and custodial officers, elected state officials and two classes of judges (in this context, hereinafter referred to as Members). ERS invests state and Member contributions in the retirement trust funds and administers the trust funds with a fiduciary obligation to the members and retirees of ERS who are its beneficiaries. ERS also administers the Texas Employees Group Benefits Program, which consists of health benefits, life insurance and other optional benefits, to participating individuals eligible to receive those benefits under applicable law.

The Benefits Communications Division (BCOM) of ERS is responsible for communicating with program participants and other audiences – educating them about how their benefits work, the value of those benefits, and statewide and nationwide issues that could affect the cost and availability of employer-sponsored benefits. Although State of Texas employees and retirees are our primary audiences, BCOM also communicates with human resources professionals at State of Texas agencies and higher education institutions (who are often the first source of benefits information for ERS members) and assists with communications to state legislators and other stakeholders, such as state employee and retiree organizations and the public at large.

The ERS website is our primary means of communications with our key audiences. It is made up of nearly 2,000 pieces of content on 250 pages. During August 2015, we had nearly 115,000 visitors viewing over 630,000 page views. The current site was redesigned in 2014, following extensive usability studies. The content organization is task-focused for primary user segments, which include: members, retirees, and agency and institution employers.

This Statement of Work (SOW) is for an assessment and redesign of the ERS website. The groups who utilize the web site are generally: (1) ERS members and retirees, (2) state agency and institution employers, (3) state legislators and their staffs, and (4) state employee and retiree organizations. In addition, prospective employees / job seekers, and people and organizations who want to do business with ERS use the website and are a secondary audience of the site.

The website is currently maintained primarily by BCOM, by the Website Administrator, who oversees website projects and content management, including content structure, quality control, and accessibility. Each department also has an assigned web content provider trained to update their department's content within our content management system, Ektron. A number of third-party applications add functionality to the website, including the following:

- Event registration – Trumba
- Live streaming of Board meetings – MediaServe
- E-newsletters – GovDelivery
- Social media – Facebook, YouTube, LinkedIn
- Employee Benefits System – Peoplesoft

ERS plans to transition to a new website Content Management System (CMS) in the next nine to 12 months. Our expectation is that the responsive development will not be applied to our current architecture, but done in parallel and at go-live transition to the new architecture.

## 2.0 Scope of Work Summary

The scope of work for the Website Redesign Project involves all planning, execution, implementation, and training for a new public-facing internet site for ERS.

1. Identify the needs of our audiences.

2. Analyze the current site for potential improvements,
3. Evaluate and propose a content management solution.
4. Create a responsive (mobile-friendly) site design wireframe.
5. Validate the design through a prototype usability study with site users.

## 3.0 Qualifications

The vendor will conduct a thorough assessment of the website and how it addresses the needs of its visitors, providing ERS with visitor personas, recommendations for immediate and long-term changes to the site, and recommendations for content optimization and prioritization.

The vendor should have significant experience working with public sector organizations, with preference given to vendors that have worked with comparable state agencies or retirement systems.

The successful vendor will be experienced and fluent with:
- responsive web design,
- user experience,
- accessibility (compliance with section 508 of the Rehabilitation Act),
- website usability analysis,
- digital strategy,
- website analytics,
- search engine optimization,
- content management,
- content strategy and
- emerging technologies.

The vendor will apply responsive web design to the site using the results of the user needs assessment.

ERS will work with the selected vendor to work as a team throughout the project. ERS staff will be available for specific assignments, regular deliverables, and project review meetings, training, testing and assistance.

## 4.0 Project Objectives and Phases

### 4.1 Planning
Kickoff Meeting
In conjunction with ERS, vendor conducts a kickoff meeting:
1. Identify key stakeholders, who will participate in developing the definition of requirements for success.
2. Identify solution goals, business drivers, and success criteria, which will help to define business requirements.
3. Determine the timeline of the project and assign vendor resources.

### 4.2 Discovery
In conjunction with ERS, during the discovery phase, the vendor conducts interviews with the ERS Project Team and other ERS staff as necessary to understand the vision, mission, and measurable goals for the website. Work conducted in this phase includes:
- Assess and document external stakeholder needs and preferences.
- Conduct a baseline usability test of the current ERS site to identify user performance and satisfaction metrics.
- Review/analyze customer service email/calls.
- Review/analyze Web logs and search logs.
- Set measurable usability objectives.
- Determine usability test strategy and select usability test methodology.

<u>4.3 Design</u>

In conjunction with ERS, during the design phase, the vendor will:

- Develop user profiles (list of user characteristics).
- Develop task matrix (tasks ranked by user groups), task lists (ranked by importance, frequency, and feasibility), and task flow/process diagrams (diagram of steps in a task/process).
- Make recommendations for changes to the site (immediate and longer term), including recommendations on changes required for best practices in model development.
- Provide a website design that is visually appealing, intuitive, and easy to use that includes, but is not limited to, template creation, security and approval levels, WYSIWYG content editor, versioning, content scheduling, etc.
  - o Use of the CMS should not require users to know HTML, CSS, XML, XSL, etc.
  - o Integrates with current software and hardware.
  - o Support the versioning and indexing of content to meet legal and policy-based records retention. Accommodates responsive design to easily change between various screen resolutions and sizes such that any device can effectively use the site.
  - o Provide consultation on user interface designs to ensure layout, design and organization is useful, usable and responsive (mobile-friendly).
  - o Conforms to State Accessibility requirements for Electronic and Information Resources specified in 1 TAC Chapters 206 and 213 and the Web Content Accessibility Guidelines (WCAG) 2.0 (as applicable).
- Conduct at least one usability test of prototypes, wireframe mock-ups, or low-level prototypes of information architecture.

<u>4.4 Implementation</u>

In this phase, the vendor will analyze current site structure and make recommendations for improvements based on user needs and task characteristics, and implement new website design. The vendor will:

- Organize site content and main categorization based on users' needs.
- Develop wireframes, page schematics and interface specifications based on research-based usability engineering practices to assist design and programming teams in implementation of site organization.
- Implement website design in previous phase.
- Perform terminology and labeling analysis to ensure site is using logical and intuitive terminology based on users' knowledge levels.

<u>4.5 Testing, Support, Documentation, and Training</u>

After all changes are complete on the website, vendor will:

- Validate the design through a prototype usability study with site users
  - o Provide comparative data from baseline usability testing of original site, prototype testing, and redesigned site testing.
  - o Report findings ranked by severity.
- Train Benefits Communications Division (BCOM) support staff on the new web site maintenance.
- ERS will test for Accessibility

## 5.0 Schedule/Milestones

For the Website Redesign Project the final acceptance of all deliverables resides with the ERS Director of Benefits Communications (Director). Once a project phase is completed and the vendor provides the final report/presentation for review and approval, the Director (or her designee) will either provide to the Vendor written acceptance of the phase deliverable(s) and indicate the next phase may begin, or provide written comments detailing the deficiencies of the deliverable(s) and provide recommendations that will make the deliverable(s) acceptable,

Once all project tasks have been completed, the project will enter the closure stage. During this stage of the project, the vendor will provide the project closure report and project task checklist to the Director. The Director will review and provide written acceptance of all project deliverables or will indicate specific deficiencies and provide recommendations that will make the deliverable(s) acceptable.

The vendor will attend weekly project status meetings to assess project status and discuss issues that arise.

The below list consists of the milestones identified for the Website Redesign Project. Vendor shall fill in the appropriate dates.

| Milestone | Days to Complete |
|---|---|
| Contract signed<br>Planning begins<br>Discovery begins<br>Design begins<br>Implementation begins<br>Testing, Support, Documentation, and Training<br>Project Completion Review<br>Project Closure and sign-off | Contract: 0<br>Planning: 10 business days<br>Discovery: 30 business days<br>Design: 60 business days (Includes Architecture & Design)<br>Implementation: NA in this scope<br>Testing, etc.: NA in this scope<br>CMS Presentation: 10 business days<br>Project Completion Review: 10 business days<br>Project Closure and sign-off: 10 business days<br>(includes hand off of assets) |

## 6.0 Proposal Process

Proposals shall be prepared simply and economically, providing a straightforward, concise description of the proposer's capabilities to satisfy the requirements of this SOW. Emphasis should be on completeness and clarity of content and cost effectiveness of the proposal.

Submissions will be made by email to sitefeedback@ers.state.tx.us.

## 7.0 Other Requirements

1. ERS will provide vendor all necessary hardware and information on current environment.
2. ERS will provide vendor administrative credentials for the web applications to be administered and changed.
3. ERS will make available authorized personnel during the project with a working knowledge of existing web architecture and applications. ERS staff will answer questions, clarify issues, as well as help during the testing phase of the implementation.
4. ERS will provide a work area for vendor to use during on-site activities that include Internet and public phone access.
5. ERS will provide parking passes and adequate parking for the vendor project team.
6. Standard hours of operation are 8 a.m. to 5 p.m. Central Time, Monday through Friday. It is understood that due to the nature of the industry and work performed, after-hours and weekend availability is often required. In the event vendor resources are required to perform work outside of the standard hours of operation, agreed-upon work windows will be discussed and subsequently documented via email. It is also required that the ERS project manager or a technical contact be on-site during the agreed-upon weekend/after-hours work window(s).
7. ERS will participate in all design and planning sessions.
8. ERS will be responsible for any necessary changes on the individual web applications.
9. ERS will provide vendor with full access to the relevant functional, technical, and business resources with adequate skills and knowledge to support the performance of services.
10. ERS delays to provide vendor the necessary data to accomplish each task may result in timeline changes.
11. Before project work begins, ERS must review and approve vendor's standard Certificate of Insurance (COI). ERS should allow up to 10 business days, if ERS requires endorsements to be added to the COI.

12. The vendor agrees that all work done under this SOW is a Work for Hire. The vendor retains no rights to inventions, copyrights, or any other intellectual property developed solely for ERS during the course of this engagement. The vendor retains rights to prior work used to develop ERS materials but grants ERS a royalty-free perpetual license to the work products of this SOW.
13. The vendor has no rights to ERS data and may not keep or use ERS data in future engagements.
14. All ERS data and work products must be erased from vendor equipment at the end of the engagement.
15. The vendor agrees to sign a Non-Disclosure Agreement for the term of this engagement.
16. Vendor may be required to perform criminal background checks on assigned staff prior to the start of the project.

## 8.0 Project Updates

ERS will receive a weekly project update from the vendor's Project Manager and a follow-up phone call will be scheduled to discuss the status and all pending items. The update will contain the following:

- Issues or punch-list items which need to be reviewed, in the following order:
  - Urgent - items marked as urgent will be reviewed by the appropriate responsible party and resolved or updated during the same day or by follow-up call.
  - Normal – requires at most one week for resolution
- Issues pending ERS feedback will be assessed during the update phone call
- Items with no due date will be noted for review and assignment at a later time
- Change requests

Additionally, ERS will require a weekly standing meeting either in person or via conference call. The vendor will provide:

- Formal agenda, and
- Task list / open items that include who is responsible and estimated completion dates.

## 9.0 Change Requests

ERS and the vendor affirm they are fully committed to completing this project on time and within the established budget. All scope changes must be reviewed by both ERS and the vendor as soon as possible, but at least by the next project update meeting. The following outlines the change request procedure:
1. ERS and the vendor will discuss the change request and mutually agree on the scope of the change.
2. ERS and the vendor's Project Manager (PM) will document the change.
3. The vendor will determine the impact to the original schedule and cost impact, if any.
4. ERS and the vendor make an addendum to the project scope documentation, milestone dates, and other required project artifacts.
5. The vendor and ERS will sign the change notice that contains the information listed in steps 1-4 above.
6. ERS will execute the Purchase Order Change Notice to the purchase order.
7. The duly authorized ERS representative who may approve change orders will be identified and provided to the vendor.

All other terms within the original SOW, in addition to the signed addendum, will remain intact.

## 10.0 Fees

1. All prices shall be firm for sixty (60) days from SOW due date.
2. All prices quoted for the entire SOW completion are on a firm, fixed price basis. The fixed fee proposed by Respondent must cover the cost incurred for all services described herein.

Respondent shall not be paid any fees or earn any compensation in connection with the Contract except for the prices proposed.

3. Prices cannot increase during the term of the purchase order unless otherwise mutually agreed-upon as a written change order to the scope of work. Price reductions from list costs shall be equal to or less expensive than those discounts stated in the DIR contract.

4. ERS is a Texas governmental public trust fund and is, therefore, a tax-exempt governmental entity. Any fees to be paid by ERS in connection with the SOW should not include taxes of any kind, and should not be increased to compensate for the fact that ERS is tax exempt. Do not include tax in the response pricing. Tax Exemption Certificates will be furnished by ERS.

5. Work completed under this SOW is considered Work for Hire.

6. Travel is not reimbursable.

7. Prompt payment of invoices will be based on the following:
   a. Respondent must have an accounting point of contact available to ERS to answer any questions during the reconciliation process
   b. Provided ERS can reconcile the invoice to supporting detail within seven (7) calendar days, ERS issues payment by the thirty-first (31st) day from the invoice received date. ERS does not accelerate payments in advance of due dates
   c. Any disputes regarding payment will be resolved in accordance with Contract terms and Ch. 2251, Texas Government Code, pertaining to dispute of invoices
   d. Respondent may submit its invoice to ERS by mail: P.O. Box 13207, Austin, Texas 78711-3207, or by email: ap@ers.state.tx.us.

8. Vendor may submit an invoice at the end of each phase. Invoices will not be processed and are considered incomplete unless ERS has accepted the work for the phase.

The price for all work products and deliverables listed in this SOW are:

| Phase | Cost |
|---|---|
| Planning | $ 4,346.15 |
| Discovery | $ $13,038.46 |
| Design | $ 39,115.39 |
| Implementation | $ NA |
| Testing, Support, Documentation, and Training | $ NA |

## Acceptance

Accepted by:

**TradeMark Media**
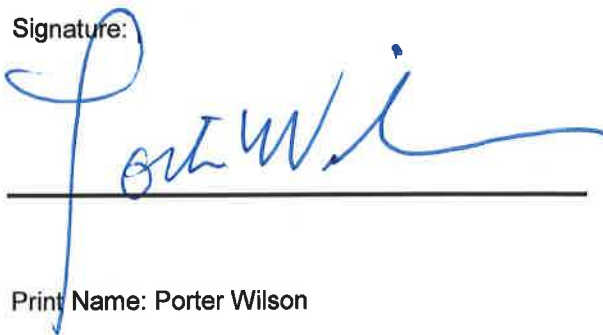
Signature:

Print Name: Nick Weynand

Title: President

Date: 3/31/2016

Accepted by:

**Employees Retirement System of Texas**

Signature:

Print Name: Porter Wilson

Title: Executive Director

Date: 4/6/2016

**DIR SOW ID #ERS-000001**
Department of Information Resources (DIR)
Authorized by: _____Grace Windbigler_____
Name: __Grace Windbigler_____
Title: ___Director, Technology Sourcing Office___
Date: _____4/15/2016 | 11:55 AM CT_____

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